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ABSTRACT

The concept of the free agent learner, which has roots in self-directed and informal learning theory, has recently emerged as a factor important to attracting, developing, and keeping knowledge workers. The literature on free agent learning holds important lessons for today's free agent learners, human resource developers, and work organizations. Self-directed learning occurs on a just-in-time basis in response to strongly felt challenges situated within highly relevant contexts. At least theoretically, free agent learners are highly self-directed in their learning. Organizations employing knowledge workers have generally changed the nature of the psychological contract between free agent learners and the organization; however, they have not always adjusted systems, rewards, and cultures to support proactive, free agent learners. Organizations that want to keep free agent learners motivated and engaged must take the following steps: make time and space for learning; provide mechanisms for continual scanning of the environment; stimulate heightened awareness around learning; build programs around goals and turning points; provide opportunities for reflection in action; and work around problems engendered by climates that are often riddled with a lack of trust and high rewards for individual achievement at the expense of others with whom employees should be collaborating. (Contains 41 references.) (MN)

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CE 080 103

Meeting the Informal Learning Challenges of the Free Agent Learner: Drawing Insights from Research-Based Lessons Learned

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The concept of the free agent learner has recently emerged as a factor important to attracting, developing, and keeping knowledge workers. This concept has roots in self-directed and informal learning theory. We draw on studies of such learning conducted over the last decade to discuss findings and implications relevant for the free agent learner. Discussion focuses on informal learning strategies and on relevant contextual, organizational, and environmental factors.

Keywords: Free Agent Learner, Informal Learning, Self-Directed Learning

In this innovative session we draw on a body of research on informal learning in the workplace that has been carried out over the last decade and that is featured, in part, in Marsick and Volpe (1999). The purpose of this session will be to identify lessons learned from this research for today's free agent learners, for those who work with this population, and for the organizations in which they work. Discussants focus on the way in which the lessons that they learned from research on informal learning can help to avoid pitfalls, as well as raise new dilemmas and issues for further research and practice.

Literature on the free agent learner frames this paper and our collective thinking for this session. We also describe a conceptual framework — informal learning from experience — that forms the basis for the research discussed in this paper. We then turn to an overview of lessons learned in the last decade about informal learning and a discussion of the role of the environment on self -directed and informal learning. We draw on the work of Kurt Lewin (1935) who hypothesized that behavior is a function of the interactions between a person and his or her environment. Lewin's work lays the groundwork for understanding the reactions of employees to changes in the psychological contract at work with respect to their own learning and to the role that the environment plays in their learning. Session leaders then highlight key lessons learned from their studies and relate these key lessons to research and practice around the free agent learner. The six studies have the following foci:

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1) Critically reflective learning during a divestiture
2) Learning to become team members in a nonprofit setting
3) Learning in paramedic partnerships
4) Meaning making among mangers of a small publishing business in transition
5) Learning how to manage in new European markets
6) Informal learning among service professionals.

Each contributor to this paper poses questions that will form the basis for dialogue groups. In the dialogue groups, participants will be asked to identify experience that they have had with research and practice around getting a better "fix" on the way in which free agent learners engage in informal learning. Each group will identify at least two group insights from this discussion around additional lessons learned, significant constraints and facilitators to such learning, dilemmas, and challenges in conducting research on this topic. These insights will be debriefed and further discussed in a closing plenary session. The conveners will help the group to identify themes that emerge, as well as lessons around the design and conduct of future research on this topic.

Free Agent Learners

Attention to the "free agent learner" has been increasing in the field of Human Resource Development. Caudron (1999) calls attention to these "independent and highly motivated adults who are taking responsibility for their own ongoing learning and development, as opposed to relying on employers to provide it for them. They're people who understand the need for lifelong learning and are doing something about it" (p. 27). Cauldron draws on statistics from the 1995 National Household Education Survey that indicate that "76 million adults age 16 and older participated in one or more adult education activities during the preceding year" (p. 28). Caudron goes on to say that this number is a 25% increase from four years earlier, and involves 40% of the adult population; that many of these learners already have college degrees and earn good salaries; and that over 50% are women. We note that the profile of these adult learners is very similar to the profile of adult learners in prior surveys on participation in adult education: "white, middle class, employed, younger, and better educated than the nonparticipant. Further, employment-related reasons account for the majority of participant interest in continuing education" (Merriam and Caffarella, 1999, p. 71).

Free agent learners are, in essence, what the field has been calling "self-directed learners." They a re proactive, and independently pursue their goals whether or not the environment is supportive to their efforts. Candy (1991) points out that self-directed learners are autonomous in their goals and/or their learning strategies. We know a good deal about self-directed learners from the literature (reviewed, for example, in Candy, 1991 and updated in Merriam and Caffarella, 1999), although there are gaps in the research that still need attention. One of those gaps is the way in which self-directed learners use informal learning strategies to augment their pursuit of more formally structured continuing education and training efforts. Marsick and Volpe (1999) describe informal learning as: 1) integrated work and daily routines, 2) triggered by an internal or external jolt, 3) not highly conscious, 4) haphazard and influenced by chance, 5) inductively occurring through action and reflection, and 6) linked to the learning of others. Informal learning may or may not be consciously used by free agent learners in pursuing their goals.

Another gap speaks to the impact of the environment on self-directed learning. Brockett and Hiemstra (1991) suggest a three-part definition for self-directed learning that examines the following: 1) The individual process of planning, implementing, and evaluating learning; 2) the characteristics of the learner; and 3) the organizational factors that facilitate and impede learning. Cauldron (1999) points out that the environment of many organizations today is not really ready for the free agent learner. After years of calling for employees to become more self-directed and proactive in their learning, companies are not always pleasantly surprised when people actively pursue knowledge and skills. Cauldron notes, "For lifelong learning to become a reality, companies have to be willing to accept the new ideas such employees are bringing to work" (p. 30). Cauldron reports two observations to the contrary by Charolotte Roberts, co-author with Peter Senge of a new book on implementing learning in organizations (Senge et al, 1999). First, free agent learners may threaten organizations because they are "less willing to do what they're told and more eager to challenge authority. . . . Another way free agent learners threaten companies is that they expect their eduation to be used *and* expect to be rewarded for having obtained that education. If neither happens, they're all too willing to walk." (Ibid).

Conceptual Framework and Methods for Studies

Many of the studies reported in this paper are included in a recent volume of findings from research on informal learning in the workplace (Marsick and Volpe, 1999) which compliment earlier work around a theory of informal learning (Marsick and Watkins, 1990; Watkins and Marsick, 1993; Cseh, Watkins and Marsick, 1999). The two studies additional studies in this paper, that of Cseh and of Watkins and Cervero, extend the findings from the 1999 volume by focusing on recent developments in global management and professionalization. The model of informal and incidental learning developed by Marsick and Watkins is based on the work of John Dewey (1938) and Kurt Lewin (1935) and on thinking of scholars who have further elaborated an understanding of learning from experience within social settings (Argyris and Schon, 1978; Mezirow, 1991). The model suggests that people learn from their experience at work when they use challenges and problems as triggers for re-examining their understanding of a situation. The context comes to the fore because the environment is so turbulent, and little can be taken-for-granted. People need to re-examine assumptions about the context as they consider alternative actions, make choices and decisions about action, and gain new knowledge and skills to implement chosen alternatives. They can learn from intended and unintended consequences, and through a review what has occurred in order to extract lessons learned.

All of the studies reported in this paper are exploratory in nature, and most rely primarily on qualitative data collected through some combination of interviews, critical incidents, and observations. One of the studies also utilized a survey (Watkins and Cervero, 1999). The conceptual framework for these studies focus in some way on learning from experience, critical thinking, and the role of environmental factors in learning. Data are typically analyzed using the constant comparative method of content analysis, and often draw on elements of grounded theory (Glaser and Strauss, 1967; Strauss and Corbin, 1990). Studies typically use convenience samples that are selected with criteria in mind that will enable researchers to shed light on the phenomenon they are trying to explain. Hence, each study speaks to a unique situation or context, and cannot be used to generalize results. However, taken together and considered theoretically, the studies provide a basis for thinking conceptually about the informal learning of free agent learners. We use the data to pose questions for further consideration in relationship to research and practice.

How People Master Environmental Changes in the Workplace

As an HR professional, I undertook an interpretive case study in the late 1980's to understand how people learn to master environmental changes in the workplace (Volpe, 1992). My overall goal was to be able to uncover new approaches and strategies to help employees in my own work as a Manager of Education and Development in a large multi-national corporation. The corporation had implemented major changes involving large-scale downsizings and reorganization that affected all parts of the organization. These changes were initiated by a newly installed President and a new Chairman. These events radically changed the corporate environment and, as such, it was logical to assume that it would have at the very least a disconcerting affect on employees. Given this set of events, I wanted to understand the extent and the degree of impact environmental changes had on the people in the organization. I made the following assumptions: 1) most learning in the workplace occurred in informal, non-structured situations; 2) the need for continuous informal learning heightened during periods of intense organizational change; and 3) an implied social contract existed between the organization and its employees.

Lewin's (1935) theories provided the overriding construct for analysis and synthesis of the research findings. Lewin proposed that human behavior is a function of both the person and the environment – expressed in symbolic terms: $B = f(P,E)$. This proposition seemed appropriate for understanding the learning behaviors of a represented segment of employees in the context of large scale change. Lewin advanced the concept of the life space by drawing on his understanding of the interaction between a person and his/her environment and the principle of contemporaneity (i.e., that only present facts can produce present behavior). Life space refers to the whole of psychological reality. It is the totality of all possible coexisting facts that influence the behavior of a person at a particular time. In other words, behavior is a function of the life space at a given time. The boundaries surrounding the person in the life space are permeable as are the boundaries that separate the life space from the greater physical world. Given this property of permeability, facts in the psychological environment can materially influence changes in the psychological environment. However, a fact must exist first in the psychological environment before it can influence or be influenced by the person.

Lewin's theory in and of itself was not sufficient. I drew on frame theory described by Bolman and Deal (1984) to analyze the organizational environment of the corporation. Consistent with Lewin's equation that behavior is a function of the interaction of person and the environment, Bolman and Deal provide a four-frame or four lens approach through which to analyze the organizational environment. These four frames are: 1) the ***structural*** – having to do with all of the systems in place, how the corporation is organized and how it operates ; 2) the ***human resources*** – refers to people issues, benefits, rewards, relationships, development, etc.; 3) the ***political*** – concerns the allocation of scarce resources, negotiation, bargaining, gaining advantage, etc.; and 4) the ***symbolic*** – the symbols that giving meaning to the corporate image. No one frame is better than another , they are simply windows through which to understand and analyze an organization.

Informal Learning: Interpreting the Changed Context

While this study set out to examine how the sample group learned to master change, a key finding revealed that the overriding issue for participants was to ***interpret and understand the changed environment***. This preoccupation with interpreting the environment serious hindered learning informally because participants no longer held the same general view of the environment. Three distinct perceptions of the new environment emerged among participants and each of these perceptions held different implications for what needed to be learned:

1. Some held simply that the nature of work had changed and therefore the challenge was to learn the new ways of carrying out work, the new rules, roles and key players.
2. Others focused almost entirely on the fact that the company was no longer paternal and that the social, unwritten, contract had been broken. For this group, their learning was more introspective as they struggled to overcome their feelings of betrayal and re-examined their relationship and attitudes toward the company.
3. The most predominant group among all the participants were those who held the view that the environment was now highly political and one had to scrabble – often at the expense of others – for the scarce resources in the company.

All of these perceptions had an impact on the former practice of learning informally. Those who were introspective, whom I called the Heart Broken, were so intensely involved in their own feelings, they had nothing left to help others learn. Those who perceived the new environment as now highly political were unlikely to share information with others – these were the Politicals. Thus, the remaining group, named the Structural, were those who focused on the changed nature of work. This group had far few people with whom they could share information. In light of this scenario, the informal network of learning had severely broken down.

Implications for the Free Agent Learner: Capacities of Human Resource Developers to Support New Learning

Questions posed by this study point to what is or isn't known about the capacity of human resource developers who are expected to facilitate the development of free agent learners. These findings were among the earliest indications that the primary responsibility for learning had shifted from the employer to the employee. The message was loud and clear — the organization was no longer paternal. Each employee would need to begin a process of continuous learning in order to develop the skills needed to survive and thrive in a continuously changing environment.

In a more recent article appearing in the August 1999 issue of Training and Development, Caudron provides an update on the learning attitudes and strategies of today's employee whom she calls the "Free Agent Learner." What began, almost under duress in the late 1970's and throughout the 1980's and 1990's has now become the new reality. Each individual is responsible for his / her own learning, for acquiring the skills needed in a continuously changing technology driven work environment. And the author tells us that today's employees are relentless in pursuing and achieving their learning goals. At the same time, Caudron points out that this new fierce individualism has had an adverse impact on today's modern organizations. She says many companies risk losing the brightest and best unless they find new ways to reward competent employees.

This study left many questions unanswered about learning in the face of the breakdown of networks and other mechanisms on which people had formerly relied for development. Free agent learners probably have totally different needs and may use the same mechanisms in different ways. Human resource developers, many of whom were participants in this study, were themselves struggling with the meaning of rapid change, and therefore, with appropriate ways to create and support new approaches to learning. A study of human resource developers who feel

they have successfully made this transition might identify critical strategies that used to move forward and to then use insights from their own experience to assist others. It would also be valuable to find out if younger people in human resources, who began their work under a different set of assumptions about the psychological contract, approach the support of free agent learners in entirely different ways.

Critically Reflective Learning

Informal learning by free agents in organizations can be facilitated in three ways: the mental capacities of the learner, the quality and quantity of interactions between organizational members, and organizational structures. Brooks (1989) conducted a divestiture study that was focused initially on the informal critically reflective learning strategies of managers in one of the Baby Bell companies at the time of divestiture in the mid-1980's. The rationale was that the transformation from a regulated to a market-driven company provided a prototypical case of the kind of learning that was going to be required of all of us as we moved toward increasingly global and technologically-driven societies.

This study was conducted in one of the Baby Bell telephone companies during divestiture. The employees were being asked to re-conceptualize their work. The organization did not use the term "free agent learner," but the leaders of the company did ask employees to function in a more proactive manner in an environment where the rules of the game were clearly changing. The study assumed that employees undergoing such a radical change needed the ability to reflect critically on themselves and the organization. Critical reflection was defined in terms of the capacity to identify and examine assumptions that shaped one's actions.

The study was a qualitative case study. The sample was identified by asking the corporation's senior internal organization development consultant to identify people he thought questioned the status quo and regularly took action to make change happen. A snowball sample of 29 managers was identified starting with this groups: 21 who consistently were named as being critically reflective (including enry level managers up to and including the chairman and CEO); 4 who were consistently identified as not being critically reflective; and 4 who were consistently named as having made a dramatic shift from not being critically reflective to being so.

Informal Learning That Was Critically Reflective

A review of some of the findings from the original study is useful for the insight they give us into the development and process of informal critically reflective learning. Different managers cited the following in-company experiences as having been central to their development of critically reflective learning skills:

- they had had a variety of work experiences within the company
- liberal arts education
- consciousness-raising seminars
- open-ended assignments
- modeling of critically reflective learning by others
- encouragement of questioning
- honest feedback
- participation in policy-making and implementation
- intercultural experiences (not necessarily part of an in-company experience)

In addition, critical reflection seemed to include some combination of the following mental and emotional strategies:

- empathic viewing of things from another's perspective
- listening to intuition
- examining an issue from different perspectives
- monitoring thought processes (maintaining honesty, dealing with "real" issues, resisting categorizing people, looking for opportunities in any change situation)
- information gathering
- experimenting
- accepting help from others

Given these findings, informal critically reflective learners appear to have several needs: (a) a variety of job experiences, (b) clear goals, (c) access to information from the top, (d) exposure to multiple perspectives, (e) a chance to see what others are rewarded for,.(f) freedom to determine their own paths to goal achievement, and (g) help in learning critically reflective learning strategies. Critically reflective learners are clearly proactive and want the organization to provide opportunities and resources for their learning without constraining their freedom to set and pursue learning goals of their own choosing.

Implications for the Free Agent Learner: Deign of Motivating Career Systems

One question posed by this study for practice is as follows: What kind of career system would attract, develop, motivate, and retain this kind of employee? An organization like the Baby Bell in this study said that it wanted an employee who is self-directing but a team player, critically reflective but creative, and takes initiative but acts responsibly. The following is a proposal of some of the important elements of such a career system. It is based on Liebowitz, Ferren, and Kaye's (1989) framework for thinking about how human resource structures can link to career development (p.41). It addresses such aspects of career development as job acquisition and movement, development and reward, organizational information and planning, and individual information and planning. Its components include the following:

- Job acquisition and movement
    - Job description – in terms of goals of specific job
    - Job posting – on intranet
    - Recruitment – inside first, then outside
    - Transfer/promotion – can be initiated by employee or supervisor/employee rewarded for transferring to a position in which they can be more productive
- Development and reward
    - Training – employee chooses and pays for own formal training and education.
    - On-the-job developmental opportunities - Supervisors and managers rewarded for developing employees.
    - Compensation – awarded for concrete accomplishments that contribute to the goals of the organization. Determined in negotiation with supervisor or manager. Compensation records for all employees are public documents.
    - Benefits – basic benefits provided for everyone. Extras can be used in lieu of compensation.
- Organizational information and planning
    - Strategic planning – open-information. Employees rewarded individually or as team for concrete accomplishments that contribute to achieving strategic plan goals.
    - All succession positions are interim until a permanent person is recruited.
    - No skills inventories maintained since jobs described in terms of goals and many paths exist to the same end.
- Individual information and planning
    - Performance appraisal – performance appraised according to projects accomplished leading toward organizational goals. All employee reports of yearly performance are open information.
    - Company and employee split the cost of career counselors to help employees.

The above proposal is radical in that it dispenses with some of the shibboleths of "good human re source" management such as yearly performance appraisal, control of information, central control, and standardization. However, it is worthy of consideration in that it demonstrates the inseparability of freedom and responsibility. Employees can only take responsibility for their own performance and act as free agent critically reflective learners to the extent that they have the freedom to critique the systems within which they work and to transform those systems in ways that better meet company goals. Like all organizational structures, a career system can be developed to facilitate the development of such employees.

Learning to Become an Effective Team Member

One skill that has been identified as critical in meeting the challenge of the changing workplace is the ability to work as part of a team (Stephans, Mills, Pace, & Palphs, 1988). This ability is essential to successfully counter the high level of uncertainty experienced by workers faced with new technologies (Jacobs & Everett, 1988). Copeland (1988) — a researcher who focuses on diversity and multiculturalism in organizations and associated training and development activities — contends that team building is critical to managing a diverse multicultural workforce. Although education and training departments have developed numerous team-building programs to address changing human resource development needs, they have focused primarily on formal learning strategies. Yet, we know that only 10 to 20 percent of what employees learn comes from structured training (Marsick &Watkins, 1990).

A study conducted in 1990 explored how employees in a medium-sized, community-based, non-profit social services agency learned informally to work more effectively in teams. The agency serves women, minorities, and others in transition by providing legal advice, social assistance, education and training, and job placement services. Like many other non-profit agencies, it depends largely on public funding and on sources of "soft" money. Thirty employees participated in the study. They came from the managers'team, the public policy and development team, the management team, and the clerical team. They worked in different functions and were diverse in age, ethnicity, gender, and educational background. Interviews, written critical incidents, and document analysis were techniques used to collect data. The participants also wrote up critical incidents, specific descriptions concerning how they understood teaming and how they learned to become members of teams. In addition, three team meetings were observed. The study shed light on the nature of teamwork, on strategies that are utilized to learn informally to be an effective team member and on facilitators of and barriers to learning effective team membership.

Strategies for Learning Effective Team Membership

Participants in the study described the strategies they used to learn effective team membership. Strategies included: structured on-the-job training, informal personal learning, and informal interpersonal learning.

Of the formal learning strategies used, structured on–the-job training — consisting of coaching, creating learning opportunities, and learning effective listening skills and feedback techniques — was portrayed as the most effectives. Participants described access to new learning opportunities and effective feedback as critical to their growth as team members, as professionals and as individuals. These aspects of structured on-the-job training were important because they provided opportunities for employees to use informal learning strategies to add new skills to their repertoire, to affirm existing skills, and to consider how the newly learned skills might apply in a variety of settings.

Although the study participants cited both personal and interpersonal informal strategies as helpful in learning to be an effective team member, personal strategies were the most frequently used. The participants identified these strategies as questioning, listening, observing, reading and reflecting. Questioning, listening reading, and observing were useful to obtain help, information, or support; to learn from alternative viewpoints; to gain the ability to provide effective feedback; and to consider alternative ways of thinking and behaving. However, only reflection allowed participants to form judgments about what was learned and to make decisions about current, future, and alternative applications of what was learned. They also used reflection to assess both the process and the outcomes of their learning experiences and of their interpersonal and trial-and-error experimentation. (Trial-and-error experimentation refers to reflecting on errors that occur because of what was done, on what was not done, or how something was done.)

The interpersonal informal learning strategies identified by the participants were mentoring, coaching, networking, and modeling. These learning strategies have been noted in the literature as powerful informal learning tools. They were not so regarded by the participants in this study, however. In fact, their descriptions of interpersonal informal learning strategies indicated a perception that the major purpose of networking, coaching, and modeling was to provide access to instructional materials or resources — that is, people materials and events — to help them in the learning process. Given this perspective, it is not surprising that the study participants cited modeling and networking as the most beneficial aspect of the interpersonal learning process. Through networking, participants were able to ask question that were meaningful to them and to obtain help, information, or support regarding effective team membership. Similarly, access to models provided opportunity to observe alternative ways

of behaving. The reflective dimension of learner-centered, learner-initiated learning strategies solidified the learning that occurred among the participants.

The study participants described factors that facilitated their learning as effective leadership, effective facilitation, interrelational aspects of teams, and individual characteristics and capabilities The role of team leaders was characterized as one of establishing the parameters of the team. The purpose and philosophy of the team as well as certain structural aspects of the team must be specified or negotiated by team leaders if members are to participate fully in team activities and benefit from the learning opportunities presented for team development. The study participants defined effective facilitation as providing an operational structure that ensures efficient team activity. Interrelational facilitators of effective team membership were defined by participants as practices that promote participation and maximum productivity from team members. Finally, Individual facilitators were identified as a propensity for teamwork, high self-esteem, and the perception that one is an asset to one's team as individual characteristics that facilitate the learning of effective team membership.

Implications for Free Agent Learners: Integrating Informal, Personal, and Interpersonal Strategies for Learning

Human resource development professionals can use informal, personal, and interpersonal learning strategies to aid in team building. Team members can be empowered by recognizing and using informal personal learning strategies. Participants were easily able to discuss formal strategies they used to learn to be effective team members. They were less able to discuss the informal strategies they used. But talking about these strategies increased their awareness of the power and effectiveness of informal learning strategies. Participants noted, though, that informal learning strategies carried less credibility than formal strategies in their own minds and within the organization. The lack of credibility became a disincentive to integrating the informal learning processes into their practice. This would sorely limit the learning of the organization as managers, supervisors and coworker fulfill the trainer's role and extend the community of learners, thereby creating a dynamic learning environment.

The findings of this study also have implications for management personnel who have responsibility for developing participatory practices — that is, teamwork — in the workplace. Under the best of circumstances, the manager's role can be extended to one of educator and the production mode to one that includes learning. Knowledge of personal learning strategies and the environments that facilitate their use are invaluable to team development.

Partners in Learning

When paramedics suggest that 'two heads are better than one," they are speaking from experience about the importance and potential of the unique working relationship that occurs between the men and women who staff our nation's ambulances. For paramedics almost always work in pairs — partners who respond to calls for emergency medical care that range from the ordinary to the terrifying. However, their statement also raises questions. Although considered equal by the state certifying agency, do these paramedics consider each other equals? Do they contribute equally to a partnership? How do partners complete the tasks of the job? Is the partnership an effective means for accomplishing the job? The answers to these questions exist in the type of partnership that develops when two paramedics are assigned by the organization to work together. These pairings have a direct bearing on what paramedics learn about how to accomplish the tasks of the job and how effectively these tasks are completed.

The nature of the paramedic part nership as well as that of the work itself, which occurs as a daily series of discrete events, provided the setting for a qualitative case study of informal workplace learning conducted by Larson (1991) [who now goes by the name of Lovin]. Twenty male and three female, full-time paramedics employed by a large southeastern provider of emergency medical services (EMS) participated. Each participant had had a variety of partnership experiences lasting as long as several years or as brief as one shift. Through written responses about the challenges of the job, individual semi-structured interviews, and extended observation of select participants, a picture emerged of distinct partnership types. How the study's participants handled the tasks of the job and what they learned from these experiences was directly affected by the types of partnerships each had developed with various partners during their periods of employment.

Informal Learning Strategies

Three less-than-ideal partnerships are evident from the stu dy. The *potentiated* partnership, in which a paramedic mentor is paired with a probationary paramedic, is either an initial or remedial partnering experience. It is effective in the sense that mentors impart the organizational culture and customs while mentees admit to trusting what they learn from their mentors. However, potentiated partners do not consider each other equals. Mentors admit that they do not trust their partners. With patient lives at stake, mentors repeatedly take over patient care. The partnership yields to a single practitioner and the potential in the pairing is lost.

When experienced paramedics are paired for limited periods, an *additive* partnership is common. Here, the effectiveness of the partners is never enhanced by their working together because neither partner places value on the partnership. While job tasks are accomplished, the partners behave as if they were working on their own. This pairing is clearly a source of dissatisfaction to participants who recognize that it negates the potential inherent in a partnership. Further, there is no evidence that participation in either an additive or potentiated partnership is a useful strategy for learning how to be an effective, contributing partner. Such learning is not recognized as useful or necessary.

In an *antagonistic* partnership, each partner feels total responsibility for completing each job task. In such a performance, as partners interfere with each other's activities, duplication occurs, effectiveness is sacrificed, and the potential of the partnership is lost. Again the culprit is lack of trust. The promise resides in a willingness of the partners to develop that trust and move the partnership forward.

Only the *synergistic* partnership achieves the potential inherent in pairing two paramedics. Here the whole is greater than the sum of its parts. The participants describe 'two people that act as one," "just mesh," and 'never say a word but talk the whole time, almost like telepathy." These paramedics also recognize that the development of the synergistic partnership is a learning process undertaken not because of any directive from the organization but because of a perceived need-to-know. The pathway to the synergistic partnership is through the antagonistic partnership; for only here do individual paramedics come to recognize that the challenge of knowing how to effectively work with a partner may be as important as knowing how to handle the tasks of the job. If they then invest the time, energy, and attention necessary to this learning project, and if the project is not disrupted by organizational reassignment, it is often highly successful.

Learning from experience occurs most often when the learner is faced with an event or situation that is recognized as disconcerting or nonroutine. The daily work of the paramedic is to handle routine and nonroutine situations. The paramedics identify the nonroutine situations of their job as sources of learning. The four types of partnerships can also be categorized as either routine or nonroutine. Potentiated, additive, and antagonistic partnerships are viewed by participants as perplexing, uneven, and insecure. As such, all three partnerships are nonroutine. The remaining partnership, the synergistic partnership, is the only one that can be classified as routine because it is viewed by partners as stable and non-threatening. Organizational staffing practices may then present each paramedic with a workplace relationship which can be as disconcerting as many of the experiences of providing emergency patient care. While this suggests that the partnership may also be a learning opportunity, that is frequently not the case.

When presented with competing information, individuals make choices about where to focus their attention (Marsick & Watkins, 1990). Given the needs of patients in non-routine emergency situations, paramedics in nonroutine partnerships ignore the partnership in favor of caring for the patient. Doing so requires that they handle the situation as individuals which all but eliminates the effectiveness expected from the partnership. Even when the situation is routine, the approach of these paramedics is to continue to handle the situation as individuals, this time in tandem; one assumes a leadership role and the other follows. Throughout most of the time paramedics work together in nonroutine partnerships, each paramedic ignores the partnership in favor of completing work tasks because neither perceives a need to learn how to partner.

The effectiveness of pairing two paramedics is evident when synergistic partners handle routine and nonroutine work assignments. Because the partnership is routine the partners are free to focus on the task. These tasks are accomplished in a spontaneous fashion in routine situations and in a synchronized manner when the experience is nonroutine. Working together to complete these tasks is often a source of significant learning, for the potential for learning is not only in the task itself, but in how the task is viewed in terms of the partnership.

Implications for the Free Agent Learner: Jobs Designed to Consider Interpersonal Rapport and Trust

One question posed by this study for practice is as follows: How can organizations provide greater choice in job design and job assignments to free agent learners whose performance and expertise clearly depend on interpersonal rapport and trust among those who work closely with one another? There appears to be an increasing demand by the public for mistake-proof job performance from health care providers. In response, EMS organizations are providing additional content-based continuing education in an effort to insure that individuals are current in the subject matter of the discipline. Yet this study and the paramedics themselves say that most of their learning occurs informally as part of the job. In addition, it seems clear that the nature of one type of workplace relationship, the paramedic partnership, directly affects if, what, and when this self-directed learning will happen. And further, the ability of paramedics to respond in the most effective way to each patient care situation depends on the existence of the synergistic partnership where partners trust each other and consider each other equals. In direct contrast, most EMS organizations staff ambulances based on the assumption that any two certified paramedics versed in the organization's operating policies and patient care protocols will provide the same level of job performance in a given situation.

Rethinking how emergency service is provided from the point of view of the paramedic means addressing the importance of on-the-job self-directed learning and synergistic partnerships to the overall organizational effectiveness. With recognition of the importance of the partnership would come policies and procedures which bring consistency to staffing practices and no longer consider paramedics to be interchangeable parts. The development of synergistic partnerships would not be left to chance.

Formal and informal learning opportunities would emphasize the dynamics of working relationships so that individual paramedics would be adequately prepared to work effectively as partners. Strategies which could enhance self-directed learning would be discussed in terms of the needs of the learner. Lessons learned through on-the-job self-directed learning would be valued and opportunities provided to share and validate this learning. And finally, individuals working and learning effectively within partnerships would receive support and recognition from the organization and see the results of their efforts confirmed in the improved quality of care provided to patients.

Meaning Making in a Small Family Business

The owners and managers of a small family-owned printing business experienced a jolt when they received the financial reports that showed production was up, customers seemed satisfied, employees were working longer hours but profit was perilously down. In addition, the owners had lost interest trying to solve the myriad of problems that rarely seemed to change. The 45-year-old business had never before faced this same set of circumstances. To confront this threat to the survival of their business, the owners led an intensive learning journey to re-vision the future they would need to create to renew the company. No map existed to guide them through this transformational process.

Mary Ziegler conducted an interpretive case study to assess how the owners and managers of this small business perceived the changes that occurred in the company approximately eight months after they began their re-visioning process. Research questions included: 1) how does learning become part of the fabric of a business culture? 2) How does a company develop the capacity to become a learning organization? 3) Is organizational learning different from individual learning, and if so, how is it different?

Informal Learning Strategies

Findings resulted in provocative insights into how informal learning takes place at the individual and organizational level, particularly the way it denotes the beginning stage of intentional organizational change. The term "awakening," used metaphorically by the respondents, captures their perceptions of the changes that occurred in the company. Awareness and insight, the first step in the change process, consisted of making meaning, challenging mental models, and experimenting. These learning strategies sensitized the company to the intentional learning activities that followed and proved to be far more ambiguous, messy and elusive than is depicted in the popular management literature.

Making meaning of their organization and its need to change was a critical step in their learning process. As one owner said, "Understanding the whys has a lot more to do with things than understanding the hows. . ." Rather than attempting to solve the next problem, they began asking why they *had* the problem and what the underlying causes might be. Understanding the reasons for everyday activities had gotten lost over the years. Inquiry was a fundamental strategy for making meaning. They learned that common terms did not have common meanings so they explored and defined these terms and shared their new meaning with others. Intense involvement in the learning process enabled them to begin challenging their mental models. People made meaning by asking questions. They inquired into what terms and events meant, and then defined those terms and events to clarify them.

Mental models (Senge, 1991) are common taken-for-granted assumptions about reality. They are so ingrained they direct behavior yet reside outside normal awareness. When describing the change process, owners and managers reported that they had ceased clearly seeing their company because routine and habit had blinded them to the obvious issues that were jeopardizing the company's future. By attending and reflecting, becoming aware of their assumptions, and challenging the long-held company beliefs, they began to think of their environment in new ways. They became aware of the skills they needed to increase in order to increase their confidence to make the changes they wanted to make. Challenging beliefs was at the heart of change. As one supervisor said, "It takes a while to change your thinking. But you have to change how you think before you can change the way you do things."

Respondents reported that they acquired new skills by learning how to do things that they were previously unable to do. Although the skills being developed span a wide range, three skill areas stood out – interpersonal, cognitive, and technical. Most respondents reported that interpersonal skills were the principal skills they needed to develop. Listening was highlighted as a critical communication skill. Cognitive skills were cultivated as people began to document existing work processes, identify problems, search for root causes, and formulate solutions. Technical skills resulted in new technologies that enhanced the development of interpersonal and cognitive skills as well as improvement of work processes. These informal learning strategies – making meaning, challenging mental models, and learning how – were not separate from work because work provided the context that enabled the learning to make sense.

Although this study provided clues that would help a practitioner guide a small business throug h the start-up of a learning initiative, adult educators need new tools to help people in organizations develop their learning capacity and bridge the gap between thinking and acting.

Implications for the Free Agent Learner: Dilemmas, Implementation Issues, and Commitment

This study poses three questions in considering the learning of the free agent learner. First, how can people who began work under one dominant paradigm around learning resolve conflicts and dilemmas posed as they attempt to live and work in a new paradigm? The informal learning strategies the owners and managers used proved to be far more ambiguous, messy and elusive than is depicted in the popular management literature. In the change process, the old and new exist side by side. In one situation, it may be possible to think and act according to a new belief, while in another situation, the new belief may not emerge at all. What strategies to individuals use to deal with the inconsistencies of the learning process? Is this conflict less intense for younger free agent learners who come to the organization without as much prior mental "baggage" even though they may be impatient with the organization because it has not caught up with their mental model?

Second, what are the elements of the crucial step between taking on new convictions and implementing new behavior? The study reveals a large gap between acquiring new knowledge and the ability to effectively take action that is consistent with new understanding. The inability to convert new convictions into practice is a critical juncture in the learning process. For many of the respondents, this inability led to frustration with the learning process and with themselves as learners.

Third, what are the attributes of commitment to the deep k ind of learning and change that was evident in this study? If we knew more about commitment, could we help people persist through the difficult stages of the informal learning process when the change demanded is so great? The study suggests that learning requires commitment. As informal learning begins, the commitment to learn may be implicit and outside conscious awareness and therefore difficult to access. Commitment enabled the respondents in this study to overcome significant obstacles to learning.

Unlearning in Eastern Europe

The study of the informal learning of managers in a rapidly changing Eastern European country leads to a focus on 'unlearning." As Villinger (1996) stated: "The learning process necessary in East European enterprises also implies a great amount of forgetting. Differentiating between unlearning, on the one hand, and relearning or rather new learning, on the other hand, promises further interesting considerations with respect to the learning process as a whole" (p. 191). The discussion in this paper is based on a study bu Cseh (1998).

The purpose of Cseh's study was to examine the critical learning experiences which enabled owner-managers of small private companies in Romania to lead successfully in the transition to a free market economy, to determine what triggered their learning, what strategies they used, and what lessons they learn. Information rich cases were collected through 18 in-depth, face-to-face interviews with owner-managers of successful (on the top list of companies compiled by the Chamber of Commerce at county and country level) small (2-99 employees) Romanian private companies. The interviews were conducted in Romania at the end of 1996 and beginning of 1997. Managers were asked to describe at least three critical incidents from their managerial practice. A total of 72 critical incidents from 15 managers were analyzed for this study. The 15 managers selected for this study were between 28 and 62 years of age. They were selected to represent both genders and the nationalities (Hungarian and Romanian) specific to the two regions represented. There were six ethnic Hungarians and nine Romanians , and four female managers selected in the sample. The managers were highly educated and obtained their degrees and certificates from Romania. All but three of the managers had a university degree and one of them had a doctorate degree.

Informal Learning Strategies

The learning of the owner-managers was stimulated mostly by the ambiguity of a quasi-market economy. All the managers gave detailed accounts of their perception of the economic, political and social context in which they worked. Managers framed the business context in terms of the economic system (no help from the banks, the impact of high inflation and high taxes, uncertainty and instability) or the need to work with the government and state-owned-companies (no help and support from government and problems in dealing with state-owned companies). The economic system and the government institutions in place offered very little support or sometimes even seemed to raise barriers in the way of the small private businesses. Managers encountered people who worked within an old [regime] mentality/business work ethic; and they lacked professional and financial resources.

One of the major lessons learned by the owner-managers of small, successful businesses in Romania who participated in this study was that although many changes took place since the collapse of the communist regime, little has been changed in the way human relationships in conducting businesses were governed. Thus, those managers who did not have managerial experience in the previous regime had to learn how to work with the government and state-owned companies while those who had previous experience did not have a chance to forget or unlearn previous practices.

Almost all of the managers talked about their problems in working with state-owned companies which still have the monopoly in a lot of fields and especially as suppliers of raw materials. These companies also prefer to work with other state-owned companies, leaving the private companies on the fringe. Describing the preference of state-owned businesses to deal with their own, one of the managers who did not have managerial experience in the previous regime said:

> They [state-owned stores] know that my products are good, but some of them just couldn't care less, and they say, "why should I buy from him when the state-owned company's products are good enough?" ... These old ways of deal makings are still in place. ... If I told them to compare the two products, they told me, "No, last year we bought our products from them, too." This is exactly like the story with the street curve. Yesterday I drove in the other lane to cut the curve and nothing happened, so I can do it again today. They also bought the same products last year from that company, so this is the mentality.

The managers talked about their encounter with the old [regime] mentality/business work ethic of employees, other managers, people in general which unfortunately did not change and how that influenced their work. One of the managers stated that: 'to change people's mentality is the hardest thing to do. ... Time and education is needed, just like the communist system developed in fifty years its own kind of people. I am not

saying that fifty years are needed to change people but at least a minimum of twenty five years is needed to develop a new generation who can really live and work in a democratic society."

> Another manager talked about the mentality of some other managers in Romania. He said:
> And talking about managers, I think that they should try to gather good people in their companies, but this is again a contradiction of the previous mentality when the boss tried to get rid of all the good employees in order to eliminate potential competitors. You see, there are things like these which bring extraordinary contradictions and create problems because a lot of people have still the old mentality. They cannot realize that if you have a good company and you gather around you only incompetent people you are doomed to failure together with your company. (p. 7)

Implications for the Free Agent Learner: Nature and Facilitation of "Unlearning"

This study poses questions for research and practice around the nature and facilitation of "unlearning." According to Mariotti (1999) a major obstacle to embracing rapid change is that change requires people to unlearn old behaviors if they are truly to benefit from new learning. As Lei, Slocum & Pitts (1999) contend "Unlearning past management behaviors may hold the key to gaining momentum for change" (p. 24). Ramsey (1999) reminds his readers that much of what worked yesterday is unworkable today. In times when new developments are regular occurrences, each day presents unique challenges and new lessons to be learned and it is important to remember that part of progress and improvement is unlearning some of the old lessons that no longer are relevant to current conditions.

> Addressing the need for learning amidst continuous changes McGill & Slocum (1993) believe that "organizational learning is about more than simply acquiring new knowledge and insights; it requires managers to unlearn old practices that have outlived their usefulness and discard ways of processing experiences that have worked in the past. Unlearning makes way for new experiences and new ways of experiencing. It is the necessary precursor to learning" (p. 79). They believe that for an organization to unlearn, it needs to free managers and their organizations from roadblocks that hinder learning and embrace new practices.

According to Magrath (1997) unlearning occurs in almost all forms of adult learning. In athletics, delays from unlearning occur regularly. In trying to improve a golf grip or swing, you must unlearn the one you've used for years, which has become second nature to you. Switching between relatively similar sports or art forms shows this unlearning phenomenon most clearly (e.g. from tennis to badminton, from ice-skating to roller blading, from skiing to snowboarding; from watercolors to oil painting). In the early 1960s, when America's finest young jet-fighter test pilots became NASA astronauts, they also had to unlearn many of their skill sets. The author believes that unlearning delays come from three sources - physical (dexterity unlearning is very awkward), emotional (pride can get in the way when trying to master something new where unlearning is required), and psychological (people have built-in defense mechanisms that send them back to their comfort zone). He also observed that until the unlearning process is not on its way the progress of learning is slow and proposed the following strategies that can help unlearning: total immersion often works better than staged learning; get help from a coach or mentor; learn with other learners at your own level; determine whether you need to be an expert or merely capable at the new learning; and when you become discouraged by unlearning delays take time out for studied inspiration by reading about those who succeeded.

According to Solovy (1999) to understand unlearning, one should begin with a concept known as the dominant logic. It states that "managers make decisions based on their preconceptions of the business and the environment. The dominant logic is the sum of current corporate assumptions and institutional history. It acts as a filter, focusing corporate learning only on data that conform to it. In other words, the process of turning information into intelligence is biased. As a result, firms miss opportunities and struggle to change" (p.30). In any change effort climbing the learning curve is only half the process. The other half is the unlearning curve sometimes called the forgetting curve which suggests that when a promising new idea fails, the dominant logic is getting in the way. As Magrath (1997) described:

> Human potential and competency development are always works-in-process, whether in a business or nonbusiness setting. If all learning were instantly acquired without unlearning delays, we might be less reflective, less connected to, and less conscious of our own human histories and, indeed, less insightful in distilling their meaning. We might be all acceleration with no steering. Unlearning is as necessary to

learning as light is to shadow in an oil painting - without one , the other has no depth, no definition, no brightness. (p. 41)

Peters (1994) also talks about the importance of learning and forgetting. He states that "We rarely, if ever, directly discuss inducing forgetfulness. Planned forgetfulness? Culture busting?" and he poses the following two questions that should be addressed in strategy meetings: "What do we know that we believe for sure? How do we systematically go about forgetting what we believe before itstrangles us? "(p.128).

The challenge faced by Human Resource Development professionals is in managing both the learning and unlearning processes by developing environments conducive to them for the free agent learners. Younger generation free agent learners may not need to 'unlearn" as much as will the companies they join. Managers and human resource developers who have worked with companies for many years may be set within mental models that are no longer appropriate to the support of the free agent learner. On the other hand, it is also true that companies cannot benefit from what free agent learners bring unless both sides can open up a dialogue in which to explore constructively different points of view. Both sides may need to surface and examine assumptions that they hold that affect both the ideas that free agent learners bring, and the challenge that these ideas may pose to the way in which the organization has typically conducted business. As illustrated by the Eastern European managers in this study, freeing oneself from existing mental models that constrain the way work is done is not easy to do. Human resource developers will need to be skilled in change management, critical thinking, and constructive management of conflicting points of view to help all parties reap the benefit of the new ideas that free agent learners bring.

The Effect of Organizational Context on Informal Learning of Certified Public Accountants

Watkins and Cervero (1999) sought to determine whether two different organizational settings of CPA practice produced substantially different or equivalent learning opportunities for a practicing CPA. The study was conducted to provide expert testimony for a lawsuit. The CPA worked for approximately 2 1/2 years in a registered CPA firm, at which point he changed jobs and became an employee of a financial services firm that was not a registered CPA firm. The questions raised in the lawsuit had to do with the time needed in either environment for professional certification. The study drew on three sources of data. First, the researchers took a sample of the CPA's work history during the same six-month time frame in each of the setting exactly one year apart. Next, they constructed a survey that was answered by principals in the case to sample 31 possible formal, informal and incidental learning opportunities. Finally, they conducted interviews with the three principal parties to the case to identify examples and illustrations of learning opportunities available in each organization.

Informal Learning Strategies: Availability Within Each Organization

Analysis of the data showed that 25 learning opportunities were available at both organizations. The only differences were that the CPA firm had videotape courses and the financial services firm has not yet instituted these; and the financial services firm had tuition reimbursement while the CPA firm did not. The new CPA participated in 21 out of the 25 learning opportunities avaiilable at both organizations. The only differences were that he participated in the videotape courses at the CPA firm and that he has participated in professional association memberships at the financial services firm. Analysis of the critical incident interviews and work history documents showed that the new CPA had increasingly challenging work assignments and frequent opportunities for learning in both firms. He had 54 hours of continuing professional education at the CPA firm; he had 28.6 hours of continuing professional education at the financial services firm, but this was supplemented by 31.2 hours of professional reading for a total of 59.9 hours of learning within a comparable six-month time frame.

The new CPA's supervisor at both organizations confirmed that the CPA worked with the same range of clients at both organizations and that her supervision remained constant in both situations. The supervising CPA, a member of the senior manager at the financial services firm and former owner of the CPA firm, said that learning in a CPA firm derives from two main sources, the clients and the supervisory structure of the organization. These were largely the same at both organizations. The financial services firm is more diversified. People get training in a wider range of fields and have the opportunity for cross-training.The financial services firm has 7 officers and 55 workers, while the CPA firm had two owners and nine staff. Thus, there are many more individuals from whom to learn, both among managers and peers, in the new work setting.

Watkins and Cervero concluded that there was a strong culture of learning and support for learning at both organizations. The supervisory structure was set up so that learning was intricately woven into the fabric of work through the review process. Managers were seen as coaches and had an explicit model for doing this. The model consisted of these stages:

- prescreening of work for developmental readiness,
- preliminary coaching regarding salient issues to attend to in new projects,
- the individual performs the task and asks questions of the supervisor whenever anything comes up that he or she cannot answer,
- then there is a review by the supervisor with points to clarify,
- the individual resolves each point,
- discusses again with the supervisor,
- and a partner typically reviews it again.

Work was developmentally assigned according to the level of knowledge attained; and therefore, both workplaces were structured to support the evolving learning of a CPA and significant attention had been paid to creating a context supportive of learning in both organizations.

Implications for the Free Agent Learner: Habits of Continuous Learning

Professionals generally develop a habit of learning, a conclusion that is supported by over two decades of research (Houle, 1980; Cervero, 1988). Organizations can learn from the structures and strategies supported by professional service firms because they hold relevance for intrinsically motivated free agent learners. Without question, the major location of learning in this study was the professional's work settings. Scholars suggest that the most powerful learning in these settings derives from the particular work assignments and the ways in which the organization is structured to promote learning. Recent work on the learning organization suggests that organizations can deliberately and strategically build a continuous learning infrastructure (Marsick and Watkins, 1999; Watkins and Marsick, 1993, 1996). The organizational context can therefore be assessed for the degree to which it consciously provides opportunities for learning and development.

This study raises questions for learning from work by free agent learners in other contexts:

1. how individuals, under changing and challenging circumstances, perceive their work contexts;
2. how they decide what they need to learn and how they go about learning; and
3. how the organization supports or discourages these learning processes.

The organizational context matters by producing different work assignments, which, in turn, lead to different opportunities and priorities for learning. The organization can provide different incentives for learning such as tuition reimbursement, and can provide resources such as a library of reference material, subscriptions to professional journals, video courses, or computer-based courses. In particular, the organization can encourage peers to work and learn collaboratively (Marsick and Watkins, 1999; Watkins and Marsick, 1993, 1996).

Conclusions

Self-directed learning takes place just-in-time in response to a strongly felt challenge that is situated within a highly relevant context. Free agent learners are, theoretically at least, highly self-directed in their learning. The studies in this paper, however, point to the fact that much learning in work contexts occurs in unplanned ways. Informal learning might be intentionally sought by free agent learners, but informal learning is also tacit, non-linear, and serendipitous. The capacity of free agent learners depends, as well, on their ability to step back from their original perceptions and be open to other information in their experience : about themselves as people and learners, about others and the way they interact with them, about the dominant logic of their enterprise, about clues within the organization about priorities and valued practices, and about the nature of the external environment.

Organizations have changed the nature of the psychological contract, but they have not always adjusted systems, rewards, and cultures to support proactive, free agent learners. Organizations that want to keep free agent learners motivated and engaged need to:

1) make time and space for learning
2) provide mechanisms for continual scanning of the environment

3) stimulate heightened awareness around learning
4) build programs around goals and turning points
5) provide opportunities for reflection-in-action, and
6) work around problems engendered by climates that are often riddled with a lack of trust and high rewards for individual achievement at the expense of others with whom employees are supposed to collaborate.

Human resource developers have been adept at building visible, structured systems for learning that include training programs. It is much harder to create an infrastructure for informal learning that does not destroy what it sets out to encourage. The challenge is to build systems, rewards, and cultures that set high expectations around learning, provide resources and opportunities, create rewards that are appropriate for high levels of intrinsic motivation, and then get out of the way of those free agent learners as they set their own path to meet their own goals. On the other side, then, organizations must develop systems that enable and entice free agent learners to share what they have learned with others so that the organization also benefits from this enhanced knowledge. Organizations grappling with the meaning and practice of knowledge management are now in the throes of working through this kind of challenge.

As we close, we note that one cannot assume that organizations are benign in their expectations and incentives around free agent learners and around informal learning. Although not the subject of this paper, recent work by Garrick (1998) and by Casey (1999) attests to explicit and covert processes in organizations, and among learners themselves, that create a climate of exploitation and / or repression. Future researchers should continue to explore the shadow side of organizations with respect to informal and free agent learning.

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